DOCUMENT RESUME

ED 303 607 CE 051 827

AUTHOR Ventura, Catherine A.; Worthy, Edmund H., Jr.
TITLE Education for Older Adults: A Synthesis of Significant Data.
INSTITUTION National Council on the Aging, Inc., Washington, D.C.
SPONS AGENCY Administration on Aging (DHHS), Washington, D.C.
PUB DATE 82
NOTE 55p.
AVAILABLE FROM National Council on the Aging, Inc. Publications, Department 5087, Washington, DC 20061-5087 (Order No. 116-ER: $6.00 plus $2.00 shipping and handling).
PUB TYPE Reports - Research/Technical (143)

EDRS PRICE MF01 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS *Adult Education; Data Analysis; Educational Attainment; Educational Planning; *Motivation; *Older Adults; *Participant Characteristics; Participation

ABSTRACT

Despite the record numbers of older learners today and the probable future growth of these numbers, older people today are underrepresented in adult education. Furthermore, a significant segment of older people has serious educational deficiencies hindering their ability to cope in the contemporary world. Surveys show that the characteristics that predispose older persons to participate in educational activities are being an older woman; being a young older person; having a higher educational level than the median for the total population of older persons; being white; and having an annual income over $20,000. A higher educational level predisposes older persons to participate in educational activities. Older persons most often take courses that provide a continued sense of meaning to their lives or a sense of control or coping. They take courses offered by colleges or universities, community or senior centers, employers and business, and community-based settings. Participation motivations include personal interest and acquisition of job skills. The main reasons for not taking courses fall into these categories: not interested; too old; poor health; and not enough time. Future research needs and questions to help policymakers and planners determine where to focus their attention include general data, education for elderly minorities and special populations, and delivery of educational programs and activities. (YLB)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED303607

EDUCATION FOR OLDER ADULTS
A SYNTHESIS OF SIGNIFICANT DATA

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)
This document has been reproduced as received from the person or organization originating it.
Minor changes have been made to improve reproduction quality.
Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL IN MICROFICHE ONLY HAS BEEN GRANTED BY
Sara Pfeiffer
National Council on the Aging
TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

Prepared by

Catherine A. Ventura
and
Edmund H. Worthy, Jr.

National Policy Center

National Policy Center on Education, Leisure and
Continuing Opportunities for Older Americans

The National Council on the Aging, Inc.

CE051427

BEST COPY AVAILABLE

Partial support for preparation of this study was derived from the administration on Aging under Cooperative Agreement No. 90-AP0001/02. The views expressed are those of the compilers and are not attributable to the Administration on Aging.

The National Council on the Aging, Inc.
© 1982

TABLE OF CONTENTS

		Page
	EXECUTIVE SUMMARY	iii
I.	INTRODUCTION	1
II.	EDUCATIONAL ATTAINMENT OF OLDER ADULTS	3
	The Undereducated	5
III.	PARTICIPATION IN EDUCATION	9
	Age	12
	Sex	14
	Educational Attainment	15
	Race	16
	Income	17
	Other Variables and Summary	18
IV.	LEARNING INTERESTS AND COURSES TAKEN BY OLDER LEARNERS	19
	Learning Interests of Older Adults	20
	Types of Courses Taken by Older Learners	21
	Where Older Adults Take Courses	24
V.	PARTICIPATION MOTIVATION AND BARRIERS	28
	Reasons for Participation	28
	Barriers to Participation	33
VI.	RESEARCH ISSUES, NEEDS AND QUESTIONS	37
	Education for Older Adults: General Research Needs	38
	Education for Elderly Minorities and Special Populations	39
	Delivery of Educational Programs and Activities	40
VII.	APPENDICES	42
	Appendix A: References	42
	Appendix B: Survey Designs & Methods	45

LIST OF TABLES AND CHARTS

		Page
TABLE I:	Educational Attainment of the Population 65 Years Old and Over and 25 Years and Over: 1952 to 1990	4
TABLE II:	Educational Attainment of the Elderly by Age and Race, March 1979	8
TABLE III:	Numbers and Proportions of Participation in Educational Activities	10
TABLE IV:	Demographic Characteristics of Those Who Took Courses in the Past Year By Age Groups: 1981 and 1974	13
TABLE V:	Subject Areas Which Older Persons Showed Interest in Studying: Results from Two Surveys	20
TABLE VI:	Learning Interests of New York State Retirees	21
TABLE VII:	Types of Courses Taken by Persons 65 and Over in 1981	22
TABLE VIII:	Participation by Older Adults in Different Types of Courses by Age Categories, Sex and Educational Level	23
TABLE IX:	Where Adult Education Participants took courses, 1981 and 1974	25
TABLE X:	Percent Distribution of Older Adult Participants in Educational Activities by Location	26
TABLE XI:	Where Courses Were Taken by Population 65 and Over by Selected Characteristics: 1981	27
TABLE XII:	Reasons for Taking Courses by Participants 65 and Over, 1981 and 1975	30
TABLE XIII:	Reasons for Taking Courses, 1981 and 1974	31
TABLE XIV:	Main Reasons Why Not Taking Courses or Not Enrolled in Some Educational Institution	34
TABLE XV:	Barriers to Participation	35
CHART I:	Educational Attainment of the Elderly: United States, 1962-2014	6

EXECUTIVE SUMMARY

Since 1969, several national surveys have collected data and information on the educational activities of older adults. The National Policy Center on Education, Leisure and Continuing Opportunities for Older Americans has synthesized the results of these surveys and produced this factsheet highlighting some of the significant findings.

- Older Americans today are participating in educational activities in record numbers and in greater proportions than ever before, but continue to be under-represented in relation to their proportion in the total U.S. adult population (Aging in the Eighties: Americans in Transition, 1981, compiled by NCOA and Louis Harris; and Participation in Adult Education, 1981, compiled by The National Center for Education Statistics, NCES).

- Only 5% of the elderly population took a course or were enrolled in an educational institution. However, this is a marked increase from 2% in 1974 (Aging in the Eighties, 1981; Myth and Reality of Aging in America, 1974; NCOA/Harris).

The findings of the 1981 NCES survey reveal the following:

- While people 65 and over comprise 11% of the total adult population seventeen years and older, they constitute only 3.6% of those who participate in educational activities.

- In 1981, 768,000 persons 65 and older, or 3.1% of all older Americans, participated in educational activities. This is the highest number and proportion of older people involved in adult education ever recorded by the NCES.

- In the twelve years ending May 1981, the number of persons 65 and older participating in adult education has almost tripled, growing at the average rate of 30% every three years compared to an average rate of 12% for adult participants of all ages.

- The participation rate of the elderly population in adult education has increased from 2.4% in 1978 to 3.1% in 1981, the largest rate increase (0.7%) for a three-year period since NCES started collecting similar data in 1969.

- The number of elderly persons (65 and over) who participated in adult education increased 39% since 1978 -- from 551,000 in 1978 to 768,000 in 1981.

Characteristics of Older Learners

A secondary analysis of several surveys shows that the characteristics which predispose older persons to participate in educational activities are:

- Being an older woman;

- Being a young older person (age 65 - 69 rather than 75 or over);
- Having a higher educational level than the median for the total population of older persons;
- Being white; and
- Having an annual income of over $20,000.00.

(Participation in Adult Education, NCES, 1975, 1978, 1981; NCOA/Harris, 1974 and 1981).

Educational Attainment

- While age appears to be a major determinant of participation in educational activities by older persons, educational attainment appears to be equally important. All survey results show a strong association between years of schooling completed and participation in education (NCES, NCOA/Harris).
- The 1981 NCOA/Harris data indicate that of those individuals 65 and over holding college degrees, 16% are enrolled in courses. The rate drops off markedly at lower educational levels.
- The 1981 NCES data report that 30% of all elderly with a high school education were participants in adult education.

The fact that a higher educational level predisposes older persons to participation in educational activities becomes increasingly important in looking to the future.

- Census figures show that the median years of school completed for persons 65 and over was 9.7 in 1980. An increase of more than two years is projected during the period from 1980 to 1990 (Current Population Reports, Bureau of the Census, 1980).
- Succeeding cohorts of older people will have more years of formal schooling. (In 1979, for people 35 to 54 years old the median years of schooling completed was 12.5.) Thus, because amount of formal education is a significant predictor of participation in adult education, future generations of older persons will be more likely to engage in educational activities.

Types of Courses Taken by Older Learners

The 1981 NCES survey results show that older persons most often take courses which provide:

- a continued sense of meaning to their lives (e.g., through philosophy, religion, language and literature and art courses) -- 39% of all courses taken; and

- a sense of control or coping (through physical education, health care sciences, business courses, home economics) -- 34% of all courses taken by older adults.

Where Older Learners Take Courses

- The 1981 NCOA/Harris survey reveals that 27% of older learners took a course at a college or university, 24% at a community or senior center, 18% at a place of business, 7% at a high school, and the remainder in various community-based settings such as libraries, museums or churches.

- Three-fifths of the courses taken by older persons surveyed in the 1981 NCES study were taken under the auspices of the following non-traditional providers: private community organizations (24.1%), employers, business or industry (15%), government agencies (11.7%) and labor and professional associations (3.4%).

Participation Motivations and Barriers

- Personal interest is by far the main reason given by older persons for participation in educational activities (65.5% of the 1981 NCES group and 69% of the 1981 Harris sample).

- Increasing proportions of older people are now taking courses to acquire job skills. The NCES data show that one-quarter of all elderly learners gave job-related reasons as the major reason for taking a course; an increase of 3.5% from 1975. The NCOA/Harris data show that among those 65 and over there has been an increase from 6% to 17% since 1974. (In the 55-64 year old group, the number jumped from 24% to 56%).

- The main reasons given for not taking courses or not enrolling in an educational institution were:

  - Not interested (45%)
  - Too old (27%)
  - Poor health (22%)
  - Not enough time (13%) (NCOA/Harris, 1974)

I. INTRODUCTION

Recent statistics show that older Americans today are participating in education activities in record numbers and in greater proportions than ever before. This report which synthesizes, analyzes and compares the findings of several recent national surveys, will demonstrate this point and will also highlight many other significant findings having policy and programmatic implications for today as well as tomorrow. It will also suggest several areas where future research is needed.

Older people's involvement in education, both in the classroom and in community-based settings, will probably continue to grow, as future cohorts of the elderly will be better educated than their current counterparts and thus will be more likely to pursue educational interests and activities. This trend raises a number of policy considerations: How should this probable growing demand for education be met and by whom; what type of learning will future older learners want and for what purposes (e.g., job retraining, self-fulfillment)? The data in this report cannot accurately predict the answers to these questions, but some inferences can be drawn by examining pertinent statistical findings from current surveys.

The record numbers of older learners today and the probable future growth of these numbers notwithstanding, older people today are under-represented in adult education in relation to their proportion of the total U.S. population. Furthermore, a significant segment of older people has serious educational deficiencies hindering their ability to cope in the contemporary world. The statistics in this report will testify to these facts and point to policy directions for the short term.

This report does not attempt to provide a definitive survey about older learners. Rather, it will collate research results and knowledge in the following selected areas:

(1) levels of educational attainment and future trends in elderly education;

(2) participation in educational activities by older persons;

(3) the learning interests of older persons;

(4) reasons and incentives for participation; and

(5) barriers to participation.

Discussion of all the above topic areas will focus on the data and information which has been generated through either national or large-scale surveys. Because of the technical nature of the methodologies and statistical procedures involved in these surveys, a brief summary of each survey or study cited is presented in Appendix B. Whenever there is some question as to the validity or reliability of the findings, this is noted or explained where appropriate. In a number of instances, further analyses or manipulations of the data conducted by Policy Center staff could not be reported because the sample size was found to be too small, and therefore less reliable when the results were examined. For example, in analyzing data from a 1981 study by the National Center for Education Statistics, findings showed that only 3.1% of the entire older adult population participates in educational activities. When this population was broken down by race, the sample size was still large enough to produce significant results. However, when these findings were further analyzed, for example, by reasons for taking courses, the numbers became too small to draw any conclusions.

While the findings presented in this paper are those with greatest relevance for policy decision-making, there are numerous, obvious gaps in current research efforts. These gaps prevent educational planners, service providers, program developers and policy-makers from having the necessary facts from which to determine appropriate strategies for providing programs and services and to take action regarding older adult education. Section VI of this paper attempts to identify current research needs and suggests several topics for future research.

II. EDUCATIONAL ATTAINMENT OF OLDER ADULTS

The extent of formal education is generally accepted to be the most important predictor of an individual's participation in adult education. At every age, income and occupational level, those individuals who spent more years in school were more likely to participate in adult and continuing education (Peterson, 1981). A closer look at the level of educational attainment of the current population of older people as compared to future groups of elderly might suggest reasons to expect changes in future participation rates of older persons with numerous implications for educational planners in identifying potential audiences.

On the average, the current population of older persons has less formal education than people under 65. For all persons over the age of 75, in the year 1980, the median school years completed was 8.8, while those 65-74 had completed 10.7 years (Bureau of the Census, 1980). For the total U.S. population 25 years and over, median school years completed was 12.5. The fact that both median school years completed and the percent of the older population who have graduated from high school are continually increasing is shown in Table I.

Table I: Educational Attainment of the Population 65 Years Old and Over and 25 Years Old and Over: 1952 to 1990

(Figures are for March of year indicated.)

	Median school years completed		Percent high school graduates	
	65 years old and over	25 years old and over	65 years old and over	25 years old and over
1952	8.2	10.1	18.4	38.4
1959	8.3	11.0	19.4	42.9
1965	8.5	11.8	23.5	49.0
1970	8.7	12.2	28.3	55.2
1975	9.0	12.3	35.2	62.6
1980	9.7	12.4	37.9	65.4
1985	10.9	12.5	44.0	70.2
1990	11.9	12.6	49.4	74.2

Source: Current Population Reports, Series P-20, Nos. 45, 99, 158, 207; and Series P-25, no. 476.

While the 1970's saw an increase of one full year in the median school years completed for persons 65 and over (from 8.7 to 9.7), an increase of more than two years (from 9.7 to 11.9) is projected during the period from 1980 to 1990. This trend predicts a larger pool of better educated older persons who will become increasingly interested in pursuing adult and continuing education activities.

A comparison of the 65 and over age group with the 25 and over group shows the large differences in the percent in each group which are high school graduates. In 1980, for example, almost 38% of the 65 and over group were high school graduates compared to 65% of the population 25 and over. In the case of both age groups, the percentage who are high school graduates continues to increase over time.

As succeeding age groups with more years of formal schooling reach age 65, the older population will continue its steady rise in level of educational attainment. It is predicted that by the year 2014, approximately three-quarters of the elderly will have at least graduated from high school and less than 10 percent will have no high school education. Chart I illustrates just how dramatic these changes have been and will continue to be.

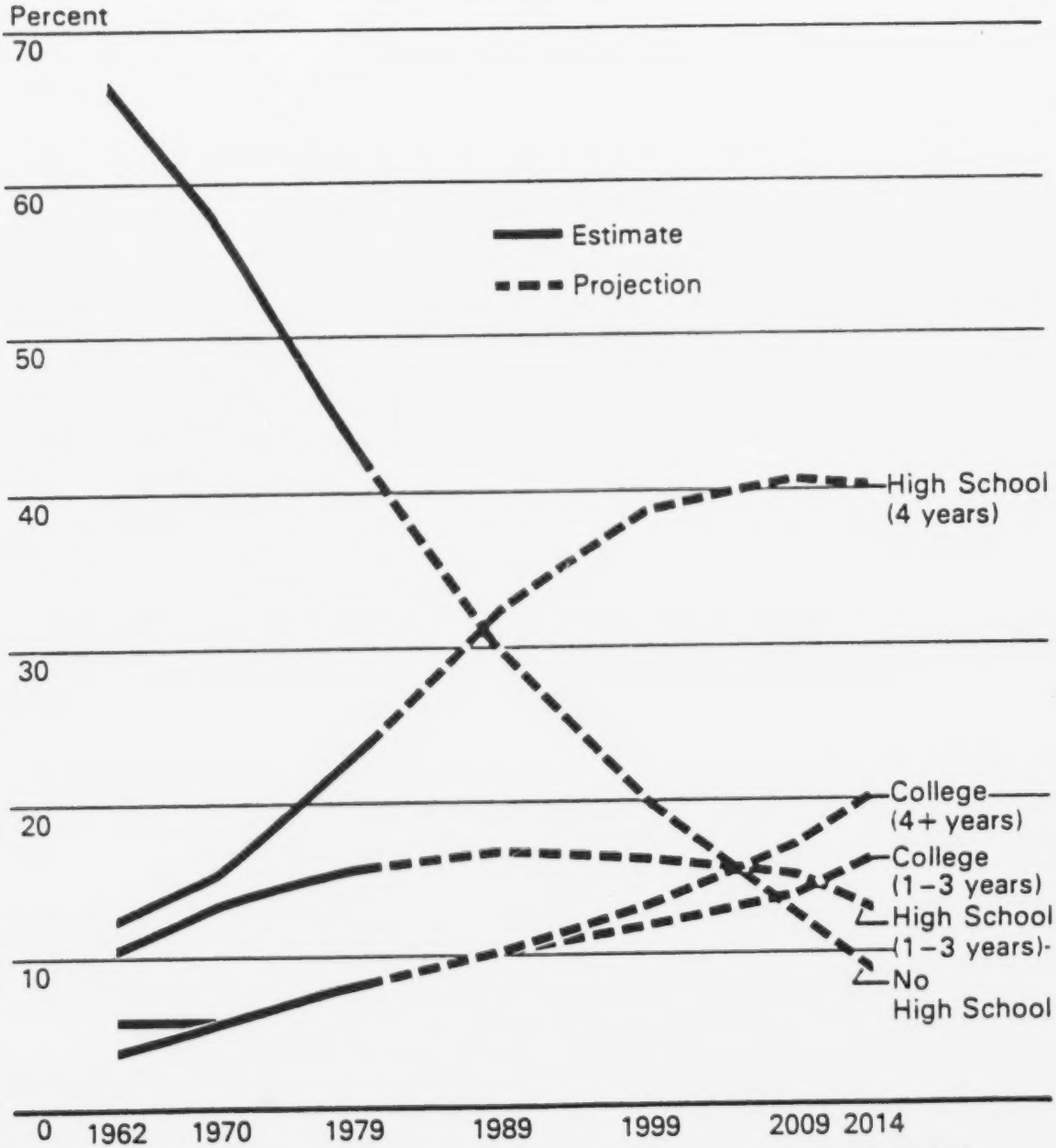
The Undereducated

As the elderly attain higher levels of education as a group, it will be of critical importance not to overlook the group with less than a high school education. In a 1974 report of the National Advisory Council on Adult Education, it was reported that among adults 16 years and over with less than a high school education and not enrolled in school, two out of three were 45 and over, and one in four was 65 or older. Also, the elderly with less than a high school education had disproportionately higher public assistance rates (NACAE, 1974).

Of all adults, the 60-and-over cohort has the largest percentage of people who are functionally illiterate (Kasworm 1981). One study (Northcutt, 1975), based on a sample of a cross-section of the U.S. population, examined the skills and knowledge necessary to cope successfully in today's society. Results showed that 35% of adults 60-65 years of age lacked skills and knowledge to successfully cope in present society; 40% of this age group were considered minimually functional, and only 24% had sufficient knowledge and skills to cope in society.

Although adult basic education programs exist throughout the country, most have attracted and reached the younger and middle-aged adult. Educational

Chart I: Educational Attainment of the Elderly: United States, 1962-2014.



Note: These data represent the entire census level legal population. Excludes elderly in institutions. The 1989-2014 projections were made using the 1979 information for age groups 30-34 to 65-74 under the assumption of no change in their educational attainment.

Sources: U.S. Bureau of the Census.
U.S. Department of Health and Human Services.

systems have not addressed the needs of the older, illiterate adult (Kasworm, 1981). While future populations of older adults will have higher levels of educational attainment, the current population of older adults has higher rates of illiteracy, more predominent representation of people for whom English is a second language, a higher rate of failing health and a higher proportional representation of semi- and skilled life occupations. Current programs will be needed at least to improve this group's ability to function successfully in today's society.

Other sub-groups of the elderly which could be overlooked as the older population continues to gain in educational status and levels of attainment are minority groups of the elderly and the "old-old." Significant differences become evident in a closer examination of the elderly's levels of educational attainment by age and race as shown in Table II.

People of all races in the 65 to 69-year-old cohort tend to be better educated than the same group of 70 to 74 year olds which, in turn, is better educated than their senior counterparts 75 and over. It is obvious that age is inversely related to educational attainment.

Table II also makes obvious the fact that the educational attainment of blacks and Hispanics age 65 to 69 lags well behind the educational attainment of whites in that same age group. The differences become even more pronounced in the higher age groups.

The next few decades will see a decrease in these differences in educational attainment between whites and minorities, as younger cohorts of minorities have more educational opportunities available than the generation which is currently 65 and older. Nevertheless, for at least the next decade or so, special efforts and outreach attempts will need to continue in providing equal educational opportunities to elderly minorities.

Table II: Educational Attainment of the Elderly by Age and Race, March 1979

Age and Race	Educational Attainment				
	None	Elementary (1-8 yrs)	High School (1-4 yrs)	College or More (1 or more yrs)	Median Years
65-69 yrs					
All races	1.9	33.9	46.0	18.4	11.1
White	1.4	31.6	47.8	19.2	11.8
Black	4.8	54.8	31.9	11.3	8.2
Hispanic	14.5	55.8	19.7	10.0	6.6
70-74 yrs					
All races	1.7	40.0	41.6	16.6	10.3
White	1.1	18.9	43.4	17.6	10.7
Black	7.4	71.2	24.3	4.9	7.0
Hispanic	18.7	54.6	17.3	7.4	5.4
75 & older					
All races	3.9	50.4	30.3	15.6	8.8
White	3.0	49.4	31.1	16.6	8.9
Black	12.9	63.7	19.8	3.5	6.4
Hispanic	27.5	56.7	12.7	3.1	4.6

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 356; August, 1980.

III. PARTICIPATION IN EDUCATION

Research studying the elderly's participation in educational activities has produced results on a wide variety of related factors. There are numerous consistencies among the studies' findings, but most of the results are not comparable because of differences in methodologies and definitions of key variables such as adult, adult education, continuing education, and educational activities. Also, education is operationally defined for purposes specific to each research effort. However, comparisons can be made between the elderly adult education participants and the younger than 65-year-old group, as well as between the elderly participants and elderly non-participants in the few national surveys which have generated data on participation in educational activities.

Older people have not been large consumers of adult education. Several studies have indicated that age, along with several other variables, is inversely related to educational participation (Cross, 1979; Johnstone and Rivera, 1965). This fact is further illustrated in Table III which summarizes data collected by (1) The National Center for Education Statistics and (2) The National Council on Aging and Louis Harris and Associates.

While these data show decreasing participation rates with age, they also show that the participation rates of both the 55 to 64-year-old group and the 65-and-over group have more than doubled since 1969 (NCES) and 1974 (NCOA/Harris) to 1981. More specifically, in the twelve years ending May 1981, the number of persons 65 and older participating in adult education has almost tripled, growing at the average rate of 30% every three years compared to an average rate of 12% for adult participants of all ages (NCES, 1981).

Table III: Numbers and Proportions of Participants in Educational Activities*

Year	Title of Survey/Report	Numbers (in thousand) and Percent Involved in Educational Activities							
		Persons 17-34		Persons 34-54		Persons 55-64		Persons 65+	
		Total #	% of Total Pop.17-34	Total #	% of Total Pop.34-54	Total #	% of Total Pop.55-64	Total #	% of Total Pop.65+
1969	Participation in adult education (NCES)	17,500	36	5037	11	774	4.5	274	1.4
1972	Participation in adult education (NCES)	20,246	37	5727	13	985	5.5	378	1.8
1975	Participation in adult education (NCES)	29,313	34	6161	13	1,165	6.0	498	2.3
1978	Participation in adult education (NCES)	21,317	33	6445	13.8	1,382	6.8	573	2.5
1981	Participation in adult education (NCES)	29,991	42.4	7605	15.6	1,738	8.0	778	3.1
		Persons 18-39 years old		Persons 40-54 years old		Persons 55-64 years old		Persons 65+ years old	
		Total #	% of Total Pop.18-39	Total #	% of Total Pop.40-54	Total #	% of Total Pop.55-64	Total #	% of Total Pop.65+
1974	Myth & Reality of Aging; NCOA/Harris & Assoc.	15,320	22.5	1762	5.0	975	5.0	436	2.0
1981	Aging in the Eighties; NCOA/ Harris & Assoc.	37,254	44.3	8616	25.0	2387	11.0	1277	5.0

* Because of different breakdowns used in defining age groups, the NCES and NCOA Louis Harris survey results have been kept separate.

Sources: NCES Participation in Adult Education, 1969, 1972, 1975, 1978, 1981.
NCOA/Harris, 1974 and 1981.

Results of other surveys generally support the fact that age appears to be a major demographic determinant of participation. Statewide surveys of participation in higher education among older adults indicate even lower rates of participation than those reported in the national surveys. A New York State study of Adult Participation in Postsecondary Education (1980) found that less than 1% of its participants were over age 60. A study of Postsecondary Education in California estimated that only 451 out of 77,121 (again, less than 1%) continuing education participants in the California state university and college system were age 60 or older. Another statewide survey which included a random sample of over 2,200 older Virginians indicated that only 1.1% of the respondents said they were "presently a student" (McAuley, et al., 1980). It must be noted, though, that both the New York and California surveys measure participation in formal higher education programs. Many other older persons quite likely participate in education at community-based, more informal types of settings. This can explain the discrepancy between the statewide survey results and the NCES results (which defines adult education as any organized educational activities) and the NCOA/Harris data (which asks if respondents took any courses at a place of business, in a school or at a community or senior center). (Other research, which demonstrates the great likelihood that older persons pursue their learning activities in less formal educational settings, will be discussed in greater detail in Section IV of this paper.)

Data presented in Table III show dramatic differences between each of the age breakdowns. For example, results of the 1981 NCOA/Harris survey show that 1981 participation rates consistently decreased by approximately 50% across each age category (persons 18-39 years old, 40-54, 55-64 and 65 and over). Some

research (Heisel, et al., 1981) has suggested that an "educational lag" exists between generations. This lag is expected to change in the future as the gap in differing amounts of schooling between generations diminishes. However, until that gap does diminish, educational planners should consider developing programs and activities which are appealing to older persons with a variety of educational backgrounds.

The 1981 NCES data indicates that record numbers of older Americans are participating in adult education today, a 39% increase from 1978. However, the fact that only 3.1% of the entire older adult population (5% according to the NCOA/Harris data) participates in educational activities is significant. Further analysis of various demographic factors of the older learners may provide insight into how these factors may influence participation.

Table IV presents the participation rates of the 55-64-year-old group and the 65 and over group by various demographic characteristics. All of the percentages in Table IV represent participants in educational activities as a percent of each population subgroup. Results of NCES and other research will be presented in the discussion of each variable.

Age

Table III has illustrated that older people's rates of participation decline as their age increases. All national surveys show that participation in educational activities is proportionately greater among younger adults and that the rate of participation drops off sharply after age 55 (Carp, Peterson and Roelfs, 1975; Cross, 1979; Johnstone and Rivera, 1965; National Center for Education Statistics, 1975, 1978 and 1981; NCOA/Harris, 1974 and 1981). Age, in short, appears to be a major demographic determinant of participation.

Table IV: Demographic Characteristics of Those Who Took Courses in the Past Year by Age Groups, 1981 & 1974.

Demographic Characteristics	55-64		65+	
	1981	1974	1981	1974
Male	12%	3%	5%	1%
Female	10%	8%	5%	2%
*Under $10,000/ 7,000	4%	3%	3%	1%
$10,000-19,999/ 7,000-14,999	10%	3%	5%	3%
$20,000-34,999/ 15,000+	13%	12%	7%	8%
$35,000+	22%	--	11%	--
Some H.S./less	3%	2%	2%	1%
H.S. or some college	14%	8%	6%	3%
College graduate	23%	11%	16%	7%
White	12%	--	5%	2%
Black	8%	--	4%	2%
Hispanic	10%	--	7%	--
Total%	11%	5%	5%	2%

*Income levels used in the surveys varied from 1974 to 1981 to reflect changes in the value of the dollar.

--Information not available from 1974 survey data.

**Results of these surveys were projected as representative of the adult civilian population in the U.S. A statistical system of weighting was applied to correct any imbalances.

Source: NCOA/Harris Surveys**, 1974 and 1981.

Sex

The NCOA/Harris data (Table IV) shows no difference by sex in participation rates in 1981 (5% of both the male and female population 65 and over participated in some type of educational activity), but an obvious increase in the percentage rates occurred for both groups between 1974 and 1981 -- +4% for the males and +3% for females. An even larger increase of 8% occurred in the 55 to 65-year-old group of males.

Increasing participation rates among older males (65 and over) also appeared in the NCES data. In 1975, 1.8% of all men 65 and over were participants; in 1978, 2.3% were participants; and by 1981, 2.7% of all older men participated in educational activities. However, in 1981, older women (65+) participated in adult education at a slightly higher rate than men the same age. About 3.4%, or 490,000, of the women 65 and over participated in adult education compared with 2.7% of the older men.

When the percentage distribution of older adult education participants is calculated, results show that women comprised 64% of the total group of older participants (NCES, 1981). Other smaller survey research efforts which have attempted to look at the characteristics of older students and have provided breakdowns by sex report varying results. Bynum, Cooper and Acuff (1978) reported that significantly more older women than men participate, even more than the proportion of females in the older population. Marcus (1978) found that females participated in the same proportion as their existence in the older population. Hooper and March (1978) found that 63% of the older men in their sample were participants as compared to 55% of the older women. However, of all the older persons who were participants, 58% were female and 42% were male.

Educational Attainment

Section II focused exclusively on the educational attainment of both current and future generations of elderly. This section will deal with how educational attainment affects participation rates of older persons in educational activities.

Almost every study or survey done to date shows a strong association between years of schooling completed and participation in education. The 1981 NCOA/Harris data (see Table IV) indicate that of those individuals 55 and over holding college degrees, 16% are enrolled in courses; the rate drops off markedly at lower-educational levels. The same differences are even more apparent in the 55 to 64-year-old group in which 23% of those holding a college degree were enrolled in courses, 14% of those with high school education or some college took a course, and only 3% of those with some high school or less were enrolled. However, since 1974, both the 55 to 64 and the 65-and-over age groups have shown increases in enrollment at all educational levels.

The 1981 NCES data showed results similar to those reported by NCOA/Harris in 1981. Of the 65-and-over population with graduate education, 12.6% were participants in adult education. Of the 65-and-over population with four years of college, 8.3% were participants; and of all older persons who were high school graduates, 30% were participants.

A study which analyzed the 1975 NCES data related to older persons' participation in education (Heisel, Darkenwald and Anderson, 1981) found that one-fourth of the older participants never finished high school, but 27% had a

college degree. Their research confirmed that, compared to the older population at large or to nonparticipants, educational attainment is still linked to educational participation. While only one-third of the older population in 1975 ever graduated from high school, 75% of the participants had at least a high school diploma.

The fact that a higher educational level than the median level for the older population, especially some college experience, predisposes older persons to participate in educational activities is supported by several smaller research studies (Bynum, Cooper and Acuff, 1978; Cross, 1979; Fisher, 1979; Graney and Hayes, 1976; Hooper and March, 1978; March, Hooper and Baum, 1977).

Race

While the educational attainment levels of blacks and Hispanics continue to lag behind that of whites, it can be assumed that the participation of these minority groups in educational activities will also be lower. The 1981 NCOA/Harris data show that 7% of the Hispanic population was enrolled in a course. However, this participation rate of older Hispanics may not be representative of the total older Hispanic population because the sample size became much smaller when the percentage distributions by race were completed on the total population who were participants (only 5% of the elderly population). Further breakdown by race made the sample size smaller and, therefore, less reliable.

The analysis of the 1975 NCES data by Heisel, et al. (1981) found that the sample size of older black learners was too small to warrant any reliable conclusions about their participation rates -- only 20 (3.9%) of the 510 older learners surveyed were black. The few who did participate tended to enroll in

Adult Basic Education, high school and college credit courses in order to improve or advance in their current jobs.

The 1981 NCES data report the following participation rates by race: 3.2 % of the older white population were participants, 1.2 % of the older black population and 1.7 % of the elderly Hispanic participated. By looking at the total population of older adult participants in 1981 (only 3.1% of the total U.S. population 65 and over), results show that 94% were white, 3% were black and 3% were Hispanic. As with the 1975 NCES data, further analysis could not be completed on the older minority participants as the sampler size was too small to warrant any reliable findings.

These findings and the small amount of supporting research on participation rates of older minorities points to the need for more research in this area.

Income

As with educational attainment, income has been shown in all the national surveys to exhibit a strong correlation to participation across all age groups (Johnstone and Rivera, 1965; NCES, 1975, 1978, 1981). The NCOA/Harris data for both 1974 and 1981 (see Table IV) support this finding in relation to both older participants and, even more so, to the 55 to 64-year-old group.

The 1981 NCES survey found that the participation rates of older men with incomes less than $20,000 were 3.5% or less and as income levels decreased, so did participation rates. However, the participation rates of older men with incomes of over $20,000 increased steadily from 6.5% of those with incomes of $20-25,000 to 8.2% of those with incomes of over $50,000. Women 65 and over also showed steadily increasing rates of participation as income levels rose -- from 2.2% of those with incomes under $7500 to 5.9% of those with incomes over $25,000.

However, the participation rates of women did not appear to be as directly related to income level as those of the men.

Income, or socioeconomic status, is often closely related to educational attainment and occupational status. A study of 400 individuals participating in a variety of educational programs (Marcus, 1978) has suggested that socioeconomic condition is a major variable in the decision-making process of whether to enroll in an educational activity or not. His data show that the more well-off one is in terms of having money, a good job and a higher education, the more likely one is to be attracted to education for expressive utility or recreational reasons. The findings support that if educators desire to expand the participation of older persons in education, they should appeal to the nonaffluent elderly through the provision of more instrumental (or practical) courses. Again, because a small minority of older persons are participants in education, it is difficult to correlate variables (such as income with participation rates) with any significance in determining which factors most strongly influence participation rates and to what extent. If income is an important factor, more research is needed to determine the impact of source of payment for course on participation rates of the elderly.

Other Variables and Summary

Other variables (such as employment status, marital status, religious affiliation and geographical factors) included in various surveys appear to have little, if any, influence on the participation rates of older adults. Again, because the participation rates of the elderly are so low, it is difficult to measure the extent to which such factors are determinants of participatory behavior. However, it would be safe to conclude that, based on the survey

results presented in this section, the characteristics which predispose older persons to participating in educational activities are:

- being an older woman;
- being a young-older person (age 65 to 69 rather than 75 or over);
- having a higher educational level than the median for the total population of older persons;
- being white; and
- having an income of over $20,000.

IV: LEARNING INTERESTS OF AND COURSES TAKEN BY OLDER LEARNERS

Havighurst (1976, 1980) argues that both instrumental and expressive aspects of learning are essential for lifelong learning. He describes instrumental education as that in which the goal lies outside or beyond the act of learning; i.e., the education is an instrument for changing the learner's situation. Expressive education is that learning in which the goal lies within the act of learning itself; i.e., for fun, enjoyment, a new experience. The literature clearly indicates that it is dangerous to try to classify the educational interests of the elderly because they are such a diverse population and seek both types of education. However, the educational planner or policy-maker can gain some insight into the types of programs and courses favored by the elderly by considering their preferred type of learning.

Research conducted by Hiemstra (1973) demonstrated that a person's occupation prior to retirement, educational attainment and previous participation in adult education activities are all factors apparently important to the types of educational activities preferred--whether instrumental or expressive. Attempts to determine the utility of courses (expressive vs.

instrumental) for various types of older persons could provide educational planners with a better understanding of the potential clientele for certain courses.

Learning Interests of Older Adults

Numerous studies have attempted to determine the educational interests and preferences of older persons. Examples of the overall interests of older persons reported in two limited surveys are presented in Table V.

Table V: Subject Areas Which Older Persons Showed Interest in Studying: Results from Two Surveys

	% Interested in Subject
Liberal Arts and Sciences	42
Arts and Crafts	32
Vocational-Technical	13
Business	6
Other	7
N = 135	100%

Data from Graney and Hayes, 1976.

	% Interested in Courses
Hobby and craft	34.4
Humanities	20.9
Social sciences	20.5
History	19.0
Language	17.9
Health and family matters	14.0
Science	12.0
Business	10.8
N = 166	

Data from Wasserman, 1976.

While participation rates for older adults in educational activities are low, a wide range of subject interests--including both instrumental and

expressive--is found. The majority of the older respondents in these two surveys expressed interest primarily in liberal arts and arts and crafts. A survey completed by the New York State (NYS Continuing Education Needs Assessment, 1977) asked respondents (both participants and non-participants) to list the subjects which were most interesting to them. They were then asked to report the subjects they considered to be of general interest. Results are reported in Table VI.

Table VI: Learning Interests of New York State Retirees

First Choice Subject	% of Resp.	Subjects of General Interest	% of Resp.
Arts and Crafts	14.6	Arts and Crafts	34.3
Gardening	6.1	Gardening	27.2
Home Decorating	5.8	Sewing	23.2
Travel	4.9	Travel	19.5
Home Repairs	4.0	Home Decorating	17.1
Sports & Games	3.3	Sports & Games	16.4
Cooking	2.3	Home Repairs	15.5
Performing Arts	2.2	Cooking	15.1
History, Govt., Current Events	2.2	Humanities	11.8
		Physical Fitness	11.5

% of Total = 100
N = 1131

Data from NYS Continuing Education Needs Assessment, 1977.

It should be noted that virtually all interests reported by retirees who responded were recreational rather than job-related. Also, arts and crafts again rated highly on each list.

Types of Courses Taken by Older Learners

The previous section discussed the variety of courses in which older persons have shown interest; however, interest does not necessarily mean that

participation will result. Table VII shows the type of courses taken by persons 65 and over in 1981 (NCES).

Table VII: Types of Courses Taken by Persons 65 and Over in 1981

Course Subject (in rank order)	Number (in 000's) of Adult Ed. Courses Taken by Persons 65 and Over
Philosophy/Religion	183
Arts; Visual & Performing	182
Physical Educaton & Leisure Studies	105
Health Care Sciences	98
Business	93
Home Economics	92
Language and Literature	82
Social Sciences	55
Agriculture	49
Health Education	35
Education	28
Engineering & Engineering-Related Tech.	25
Personal Services	15
Life Sciences	14
Interdisciplinary Studies	3
Unable to classify & NA	74
TOTAL:	1133

Source: NCES (1981)

These results show that older persons most often take courses that provide (1) a continued sense of meaning to their lives (e.g., through religion, philosophy and art courses), and (2) a sense of control or coping (through physical education, health care sciences and business courses).

A more complete analysis of the different types of courses taken by older persons (60 and over) was completed on the 1975 NCES data (Heisel, et al., 1981). Results of this analysis are reported in Table VIII which shows that age, sex and education are all related to the kinds of courses older adults

Table VIII: Participation by Older Adults in Different Types of Courses by Age Categories, Sex and Educational Level, 1975

Type of Course		Age Categories				Sex			Education				
		60-64	65-69	70+	%	Male	Female	%	Less than H.S.	H.S. diploma	Some college	College degree	%
Hobbies		36.8	33.1	30.1	100	18.0	82.0	100	25.6	36.1	16.5	21.8	100
Personal improvement		31.6	38.2	30.3	100	23.7	76.3	100	21.1	22.4	22.4	34.2	100
Professional		67.1	23.9	9.0	100	43.3	56.7	100	7.5	23.9	9.0	59.7	100
Religion		25.0	37.5	37.5	100	35.7	64.3	100	26.8	30.4	23.2	19.6	100
Technical and vocational		80.0	17.8	2.2	100	51.1	48.7	100	31.1	37.8	13.3	17.8	100
Home and family		38.5	34.6	26.9	100	26.9	73.1	100	46.2	15.4	23.1	15.4	100
High school and college credit		68.2	27.3	4.5	100	18.2	81.8	100	27.3	22.7	13.6	36.4	100
ABE, reading and math		42.1	26.3	31.6	100	26.3	73.7	100	36.8	15.8	15.8	31.6	100
Civic and public		43.8	12.5	43.7	100	62.5	37.5	100	31.3	25.0	37.5	6.3	100
Sports and recreation		53.8	30.8	15.4	100	61.5	38.5	100	15.4	38.5	46.2	0.0	100
Safety		70.0	20.0	10.0	100	70.0	30.0	100	50.0	10.0	30.0	10.0	100
Managerial		70.0	20.0	10.0	100	90.0	10.0	100	20.0	30.0	10.0	40.0	100
Other		58.0	30.0	12.0	100	47.0	53.0	100	47.1	17.6	25.5	11.8	100
Totals for sample	%	47.1	29.8	23.1	100	34.0	66.0	100	25.7	28.0	18.8	27.5	100
	N	240	152	118	510	172	338	510	131	143	96	140	510

Data from Heisel, Darkenwald and Anderson, 1981

prefer to take. Generally, participants took courses related to their hobbies (25%). Other findings include:

- Participants who were 60-64 took technical/vocational, safety and managerial courses most often.
- The 70+ group participated in civic and public service courses and religion courses.
- High proportions of women participated in all types of courses except managerial.
- Men primarily participated in managerial, safety, civic and public service, and sports and recreation courses.
- Participants with college degrees were more likely to participate in professional, managerial couses than those without college degrees.
- Those with a high school diploma were more likely to participate in vocational/technical and sports/recreation courses.

This overview of research on the types of courses in which older people both expressed an interest and actually enrolled shows that some consistencies apparently exist in the findings. While many elderly express interest in courses related to hobby and crafts, liberal arts and the humanities, findings report that these are also the types of courses in which they are enrolled. Findings also suggest that types of courses taken are influenced by age, sex and educational attainment of the elderly. More in-depth research is needed on both the educational interests of older adults and the types of courses in which they participate so that planners and policy-makers can develop programs to better meet their educational needs.

Where Older Adults Take Courses

Just as important as the types of courses taken by older adults are the locations in which these courses are offered. The results of the 1981 and 1974 NCOA/Harris surveys (reported in Table IX) found that learners 65 and over are

now most often enrolled in colleges and universities (27%), just as the 18 to 64-year-old group of continuing education students is (47%).

Table IX: Where Adult Education Participants Took Courses, 1981 and 1974

	1981		1974	
	18-64 (%)*	65+ (%)*	18-64 (%)*	65+ (%)*
A Place of Business	29	18	**	**
A College or University	47	27	60	24
A High School	9	7	7	**
An Adult Education School	13	12	12	19
A Community or Senior Center	3	24	**	**
A Church	1	5	3	26
A Library	--	2	**	**
A Museum	--	1	**	**
By Correspondence	2	1	5	10
All Other Answers	6	6	16	21

*Percentage of adult education participants.
--Less than 0.5%
**Included in "All Other Answers" column.

Source: NCOA/Louis Harris, 1981, 1974.

The under-65 cohort shows a decline in the percent who take courses at a college or university (from 60% in 1974 to 47% in 1981), but a substantial proportion are now taking courses at a place of business (29%). Among the over-65 group, there have been sharp decreases in the percent who take courses at churches (from 26% in 1974 to 5% today) and by correspondence (from 10% to 1%). Almost one-quarter of the 65-and-over population in 1981 was enrolled in courses at a community or senior center. Because of the small percentages of older persons enrolled in courses (3.1% in 1981 and 2.5% in 1975), more refined analyses of the data will not produce reliable results because the numbers are too small to warrant any conclusions.

Table X presents results of the NCES data about location of courses taken by older people. The largest percentages of older adults were enrolled in courses at community organizations (24.1%) and at colleges and universities (20.8%). The 1981 NCES data also show that 32% of the courses taken by persons 65 and

Table X: Percent Distribution of Older Adult Participants in Educational Activities by Location

Location of Course		1981 % of Courses Taken by Adult Ed. Participants 65 & Over	1975 % of Courses Taken by Adult Ed. Partitipants 65 & Over
4-yr. college or university		7.3	6.9
2-yr. community college or technical institute		13.5	11.4
Vocational or trade school		3.9	3.3
Grade or high school		7.3	13.7
Employer		9.3	8.0
Community organization		24.1	21.2
Government agency		11.7	9.6
Labor or professional organization		3.4	5.9
Private instructor		6.1	9.4
Correspondence school		*	2.0
Business or industry		5.7	--
Other		7.7	10.0
TOTALS:	%	100	100
	N	1251**	510

*Information not available in unpublished data.

**A total of 116 of the courses reported were provided by employers for employees in addition to being provided at one of the other locations. Because the percentage is significant, the total N reported for the 1981 survey includes this duplicated count even though the total number of courses taken by older adult education participants is only 1134.

Source: NCES, 1981 and 1975.

over were taken in traditional educational settings (elementary or high schools, 2 and 4-year colleges, business, trade or vocational schools), particularly at community colleges. Three-fifths of the courses were taken under the auspices

of the following non-traditional providers: private community organizations (24.1%), employers, business or industry (15%), government agencies (11.7%) and labor or professional associations (3.4%).

The NCES findings related to the location of courses taken by older people are generally consistent with the 1981 NCOA/Harris survey results. Further analysis of the 1981 NCOA/Harris data on where courses were taken by older learners by selected demographic characteristics (e.g., sex and educational attainment) produced the following results:

Table XI: Where Courses Were Taken by Population 65 and Over by Selected Characteristics: 1981

	Students 65 Years and Over				
Location of Course	Male	Female	Some H.S. or less	H.S. or Some College	College Graduate
A College/University	14%	35%	8%	20%	39%
A Place of Business	28%	11%	31%	13%	17%
An Adult Education School	23%	5%	16%	12%	11%
A High School	11%	4%	4%	7%	8%
A Community/Sr. Center	16%	30%	27%	31%	17%
A Church, Library Museum	6%	11%	8%	11%	7%
Other	12%	5%	6%	6%	9%
Not Sure	4%	2%	--	--	6%
TOTAL	100%	100%	100%	100%	100%

Source: NCOA/Harris, 1981

These findings indicate that:

- Older men are more likely to enroll in courses at a place of business (28%) or an adult education school (23%).
- Older women are more likely to be enrolled in courses at a college/university (35%) or a community/senior center (30%).
- The majority of older persons with only some high school or less took courses at a place of business (31%) or a community/senior center (27%).
- Older persons who were high school graduates were enrolled at a community/senior center (31%) or a college/university (20%).
- Elderly college graduates most often took courses at a college/university (39%) followed by a place of business (17%) or a community/senior center (17%).

Age also appears to be an important determinant of where the elderly take courses (Heisel, et al., 1981). While the 60 to 64-year-old group shows no favored location, the 65 to 69-year-old group shows a definite preference for community organizations which become increasingly popular with even older learners (36.4% of those 70+).

More information is needed on location preferences of older adults, the characteristics of the older persons attending the various sites and the reasons for their choice of site. Only then will educational programs be developed and successfully delivered to the older population. Research done by Daniel et al. (1977) found that among institutional characteristics that attract older adults, the educational programs offered and their location are by far the most important considerations.

V. PARTICIPATION MOTIVATIONS AND BARRIERS

Reasons for Participation

There is no question that the predominant motivation for older adults enrolling in educational programs is to learn (Sprouse, 1981). However, it

seems that their participation in educational pursuits also can be related to other factors which may combine with their interest in a certain topic and motivate them to participate. Peterson (1981) suggests the following five possible explanations (based on other existing data) for why older persons participate:

(1) Institutional sponsorship--people are likely to attend courses in an institution or organization with which they have had previous contact;

(2) A tradition of educational participation--those lifelong learners who seek knowledge for its own sake and those who find it an enjoyable activity will be more likely to participate when a learning opportunity is presented;

(3) Social interaction--as older persons lose other roles, some will seek out new situations in which they can interact with others and maintain personal and intellectual contact;

(4) The need for some particular information or interest in learning about a topic; and

(5) The social support and encouragement which results from membership in the sponsoring organization.

Several studies confirm these as motivating factors or reasons for participation among older participants (Fisher, 1979; Hooper and March, 1978; Houle, 1961; and Marcus, 1981).

Other factors such as the economic pressures of the past decade, are becoming increasingly important. Tables XII and XIII present the reasons for participation given by the older adults in the NCES and NCOA/Harris surveys.

Table XII: Reasons for Taking Courses by Participants 65 and Over, 1981 and 1975

Main Reason for Taking Course	% of Adult Ed. Participants 65 and Over	
	1981	1975*
Job Related Reasons:		
To improve or advance in current position	23.5%	19.4%
To get a new job:		
In current occupation	0.1%	2.6%
In new occupation or field	1.2%	-
Other job related reasons	0.7%	-
Non-Job Related Reasons:		
For general education	5.4%	13.5%
For personal or social reason	65.5%	57.8%
Volunteer work or community activity	2.0%	3.0%
American citizenship	0.4%	-
Other non-job related reasons	1.2%	3.7**%
TOTALS:	% 100 N 1134	100 510

* In 1975, reasons were not separated according to job related and non-job related. Therefore, this "other" category includes both.

Source: NCES Participation in Adult Education, 1981 and 1975.

Table XIII: Reasons for Taking Courses, 1981 and 1974

Reasons for Taking Course	% of Adult Education Participants*	
	Persons 55-65	Persons 65 & Over
To Acquire Job Skills		
1981	56%	17%
1974	24%	6%
To Expand Your General Knowledge About Some Field or Hobby		
1981	63%	69%
1974	80%	76%
To Make Good Use of Your Time		
1981	17%	39%
1974	49%	39%
To Be With Other People		
1981	9%	26%
1974	44%	28%
Other Reasons		
1981	4%	2%
1974	--	2%

* In 1981, only 11% of persons 55-64 and 5% of persons 65 and over took courses. In 1974, only 14% of persons 55-64 and 2% of persons 65 and over took courses.

Source: NCOA/Harris, 1981 & 1974.

Personal interest is by far the main reason given by older persons for participation in educational activities (65.5% of the 1981 NCES group and 69% of the 1981 Harris sample). However, one significant finding of both the NCOA/Harris and NCES surveys from 1981 is the increase in the percent of people

now taking educational courses to acquire job skills. The NCOA/Harris data show that for the 55-64 age group who were enrolled in courses, the number has jumped from 24% to 56%, and among learners 65 and older there has been an increase from 6% to 17%. NCES data show that one-quarter of all participants in adult education in 1981 gave job-related reasons as the major reason for taking a course; an increase of 3.5% from 1975. Although participants in educational activities 65 and over showed an increased interest in acquiring job skills through education, their primary reasons for taking courses have not changed significantly since 1974.

Further analysis of the 1975 NCES data (Heisel, et al. 1981) found that age, sex and educational attainment had some bearing on why older adults engage in educational activities. Their findings include the following:

- A larger percentage of participants 60-64 took courses because of their current job, while many more of the 70 and over group did so for social and recreational reasons.
- For older women, personal interest is the main reason for taking a course. For older men, personal interest and current job were equally important motives.
- For participants with a college degree, job advancement appears much more important than for those without a college degree.
- Personal interest appears to be inversely related to educational attainment. It is given most often as a reason by those with less than a high school education (52.7%) and then proportionately declines for those with a college degree (32.1%).

A closer look at the 1981 NCES data shows that older students did not often participate in adult education for a certificate or degree. Only 3.6 percent of the courses taken by older persons were for credit toward a degree; 24% of the courses taken by the population 17 to 64 years old were for credit.

Comparatively little other research deals with the factors which motivate older persons to participate in educational activities. However, one recent study based on a comparatively small sample (Sprouse, 1981) found that age-segregated, community-based educational programs are attracting older learners with different social and demographic characteristics as well as different motivations. Their interest in social contact is a prime motivator for their participation, along with their desire to attend community classes for reasons of cost, convenience and a less formal atmosphere.

Barriers to Participation

Section II of this paper attempted to determine the influence of various demographic variables on the participation rates of older adults. Other more specific barriers discouraging participation in later life will be discussed in this section. Cross (1979) has suggested the following three types of barriers to educational participation in the adult years:

(1) situational barriers, such as lack of transportation, prohibitive costs and the inability to allocate time to this endeavor;

(2) institutional barriers, such as the location and scheduling of the course, the complexity or rigor of admission or registration, the type and level of instruction, lack of awareness of course offerings and instructors behaviors and sterotypes; and

(3) dispositional barriers, such as learning anxiety, belief that learning is impossible, lack of interest in learning, or belief that learning is not for adults and older people. (Cross, 1979).

Table XIV presents the 1974 NCOA/Harris results on the primary reasons given by both the 18-64 year old age group and those 65 and over for not

enrolling in some educational course. Data from that same year showed that only 14% of the 18-64-year-old group and only 2% of those 65 and over were participating in some form of adult education. Therefore, the responses to this question are based on an overwhelming majority of the survey group.

Table XIV: Main Reasons Why Not Taking Courses or Not Enrolled in Some Educational Institution

	18-64 yr olds (86%)*	65 and over (98%)*
	%	%
Not enough time	43	13
Not interested	32	45
Too expensive	8	2
Poor health	6	22
None available	3	3
Don't know of any courses for me	3	4
Too old	1	27
Other	15	6
Not sure	1	1

* Represents % of total NCOA/Harris Survey samples in each age category who were not taking courses or not enrolled in some educational institution.

Source: NCOA/Harris, 1974.

By using Cross's typology of barriers to participation, these results show that the primary type of barrier to older peoples' participation is dispositional--either they are not interested (45%) or they think they are too old (27%). Situational barriers rank second and include poor health (22%), not enough time (13%) and too expensive (2%). Institutional barriers were only reported by 7% of those 65 and over and included no courses available (3%) and

"don't know of any course for them" (4%). The 18-64 year old group's reasons were primarily related to situational barriers including not enough time (43%), too expensive (8%) and poor health (6%). Unfortunately, the same question was not included in the 1981 NCOA/Harris survey.

A look at what the respondents in the New York State Continuing Education Needs Assessment reported as the most frequently mentioned barriers to participation shows that they cut across all of Cross's types.

Table XV: Barriers to Participation

Barrier	% Respondents
Feel too old	22.1
No class offered	17.4
Class schedule inconvenient	16.1
Class too far away, no transportation	15.3
Lack of information	12.2
Cost of tuition	11.9
N=1131	

Source: New York State Continuing Education Needs Assessment, 1977.

It should be noted that the highest ranked barriers are personal and institutional in nature. The younger, non-retired respondents in this survey reported primarily cost and time-related barriers.

Several much smaller surveys have attempted to determine the reasons why older persons do not participate in programs or take advantage of educational

opportunities. A number of surveys have found that lack of interest in learning is probably the most common dispositional barrier to learning (Graney and Hayes, 1976; Heimstra, 1975; March, Hooper and Baum, 1977; Wasserman, 1976). Situational barriers such as cost, poor vision, health and transportation were also highly rated (Fisher, 1979; Graney and Hayes; 1976; Goodrow, 1975; March, Hooper and Baum, 1977; Thorson, 1978). Goodrow's findings reported that 42.3% of the respondents would not participate in a learning experience even if it was without cost. Institutional barriers were usually less important barriers but included too much red tape in getting enrolled and strict attendance requirements (Goodrow, 1975), lack of information (Graney and Hayes; 1976), and classes scheduled at inconvenient times (Fisher, 1979).

While barriers to participation have been easily identified by respondents from the large pool of elderly non-participants, Sprouse (1981) has suggested numerous ways in which educational programmers can compensate for or eliminate some of the barriers. These include non-competitive programs, supportive services, adapting instructional techniques, and changing the educational format to include such things as low-cost daytime classes.

Current information on barriers to participation by older students needs to be disseminated to college and university administrators, faculty, educational and program planners, and adult educators. They must be made aware of those factors which will make their programs and classes more attractive to the older learner. More research is needed, however, as little has been written about physical facilities, parking, location of courses, faculty attitudes, and other factors which could prove to be barriers to participation.

VI. RESEARCH ISSUES, NEEDS AND QUESTIONS

Darkenwald (1982) suggests that the practice of any discipline is directly related to the level of development of that discipline's knowledge base. He feels that the field of adult education is inadequately developed and the store of tested knowledge about adult education itself is sorely deficient. Few studies in the area of adult education can be considered basic, rather than applied, in the sense that they contribute to the general store of knowledge and understanding in the field rather than to the solution of narrow problems of limited general significance. Not that purely applied research, such as a needs assessment, is not important or useful, but the results do not necessarily add to the general knowledge base of adult education and cannot always be transferred to other situations.

In the case of education for the elderly, the base of both basic and applied knowledge is even more limited and considerably less developed. The limitations of this paper reflect similar deficiencies in the knowledge base, for the paper has synthesized data from all available national research studies. Discussion focused on the five general areas in which data is available on education for older adults (levels of educational attainment, participation in educational activities, learning interests, reasons and incentives for participation and barriers to participation). These areas are not necessarily those most relevant for policy-making but nonetheless provide a baseline from which some trends can be perceived, questions can be raised and future research needs identified.

Significant gaps in research were identified throughout this report and were discussed within the context of the topic area being presented. Again, these brief discussions were limited to the five general areas included in this paper. Several additional, more complex and policy relevant questions emerge

from the data which is not reported and does not presently exist. The following section more specifically addresses future research needs and questions, particularly for generating data and information which will help policy makers and planners determine where to focus their attention.

Education for Older Adults: General Research Needs

The National Center for Education Statistics and the Bureau of the Census collect useful nation-wide data on participation in adult education and on levels of educational attainment. These data sources have proven fundamental to this synthesis, but additional research and analysis could be more easily undertaken if more of the data available to the public were broken down by age. For example, a majority of the NCES data is cross-tabulated by race, but few of the findings are cross-tabulated by age of participants. This information can be obtained by going to the original computer tapes, but this becomes costly for individual scholars or institutions.

The availability of more sophisticated projections can substantially improve the capabilities of planners to develop programs for future cohorts of older persons. The Census Bureau has projected what the anticipated levels of educational attainment of the elderly in the early 21st century will be. It would also be helpful to project other characteristics which influence the elderly's rates of participation in education to determine what the future demand for educational programs will be like. If such projections could be made, policy formulation and development could reflect the anticipated or predicted trends.

Another general area of research in education for older adults which has been overlooked, relates to generational or cohort effects of participation vs. non-participation. While this would require a longitudinal method of research

and a considerable amount of time, the collection of such data could add much to understanding participatory behaviors of older learners.

Since 1969, NCES has conducted a survey on participation in adult education every three years. Because the definitions and methodologies used in conducting the surveys have changed (NCES, 1980), comparison of survey results and plotting of trends in adult education is not very reliable. To avoid having similar problems with other national data bases, several research needs can be identified to improve future efforts.

- Data should be collected in uniform manner so that results can be compared over time;
- A standard definition of education needs to be employed in determining the scope of what is being studied;
- If information on older persons useful to planners and policy-makers is to be generated, the sample of older participants must be large enough to provide valid and reliable results when detailed analyses are made.

These suggestions might also have application to state efforts in collecting information on older learners. New York and California have been leaders in gathering such data. Other states need to develop a permanent data collection system on adult learning, and not limit the focus to participation in postsecondary education. Like New York, other states need to collect information on participation in continuing education. This information would be even more useful if some common set of definitions and research foci allowed comparisons of older learner and program characteristics across states.

Education for Elderly Minorities and Special Populations

The findings presented in this synthesis show that older members of minority groups tend to have lower levels of educational attainment and lower participation rates in educational activities than whites. Education for low-

income and minority populations requires special attention and raises several questions which could be addressed by future research.

- Since elderly minorities have much lower participation rates compared to whites, what are the barriers to their participation? What has been and can be done to overcome these barriers and involve elderly minorities in a variety of educational activities?
- Are the educational opportunities currently offered not meeting the needs or desires of the minority non-participants?
- Do special programs need to be developed specifically for elderly minorities, or could information and outreach services improve participation rates of these groups?
- Why are adult basic education courses not being extensively utilized by older adults who can benefit from them?

These research questions need not be limited to minority groups of older persons but can be applied also to other subgroups of the elderly including the very-old, the handicapped, the disabled and the undereducated. The basic questions seem to be what types of educational programs are most suitable for these elderly populations and how they can become more involved or participate at higher rates.

Delivery of Educational Programs and Activities

Several questions arise concerning the delivery of educational programs and activities for older adults and offer many opportunities for future research. Examples include the following:

- What types of supportive services are most useful in helping older students have successful learning experiences?
- What are the preferred and most effective instructional techniques used in teaching older adults?
- To what extent are "new technologies" being used in the education of older adults, and how effective might these techologies be with older learners?

- Since larger percentages of older persons are enrolling in courses for job-related reasons, to what extent are businesses and private industries providing educational opportunities for older adults?
- In collecting information on the barriers to participation, to what extent are physical barriers (facilities, parking, registration procedures, cost) limiting the elderly's participation?

The numerous gaps in research and the limitations of existing research and data collections on education for older adults contribute to the need for more and better research in this area. While this synthesis has presented a general overview of significant research, it has only begun to explore the nature and extent of the elderly's participation in education. The complex nature of their participatory behavior lends itself to further investigation which could have implications to a number of agencies, organizations and educational institutions serving the elderly. However, if the results of such research are to be useful, they must be channelled to the educational planners and policy makers who can apply them to program and policy development.

VII. APPENDICES

Appendix A: References

Anderson, R., & Darkenwald, G., Participation and Persistence in American Adult Education, New York: College Board, 1979.

Bynum, J.E., Cooper, B.L., & Acuff, F.G. "Retirement reorientation: Senior adult education." Journal of Gerontology, 1978, 33, 253-261.

California Postsecondary Education Commission, 1981 Information Digest. Sacramento, CA, 1981.

Carp, A., Peterson, R. & Roelfs, P. "Adult learning interests and experiences." In K.P. Cross & J. Valley (eds.). Planning non-traditional programs. San Francisco: Jossey-Bass, 1975.

Cross, K.P. "Adult learners: Characteristics, needs and interests." In R.E. Peterson (ed.). Lifelong Learning in America. San Francisco: Jossey-Bass, 1979.

Daniel, D.E., Templin, R.G., & Shearon, R.W. "The value of orientations of older adults toward education." Educational Gerontology, 1977, 2, 33-42.

Darkenwald, G. G. & Merrian, S.B. Adult Education: Foundations of Practice. New York: Harper & Row, 1982.

Fisher, J.C. Educational attainment, anomia, life satisfaction and situation variables as predictors of participation in educational activities by active old adults. Ph.D. Dissertation, University of Wisconsin, Milwaukee, 1979.

Goodrow, B.A. "Limiting factors in reducing participation in older adult learning opportunities." The Gerontologist, 1975, 15, 418-422.

Graney, M.J., & Hayes, W.C. "Senior students: Higher education after age 60." Educational Gerontology, 1976, 1, 343-360.

Harris, L. and Associates. Myth and Reality of Aging in America. Washington, D.C.: National Council on the Aging, Inc., 1974.

Harris, L. and Associates. Aging in the Eighties: America in Transition. Washington, D.C.: National Council on the Aging, Inc., 1981.

Havighurst, R.J. "Education through the adult life span." Educational Gerontology, 1976, 1, 41-51.

Havighurst, R.J. "Life-span developmental psychology and education." Educational Researcher, 1980, 9, 3-8.

Heisel, M.A., Darkenwald, G.G. & Anderson, R.A. "Participation in organized educational activities among adults age 60 and over." Educational Gerontology, 1981, 6, 227-240.

Hiemstra, R.P. "Educational planning for older adults: A survey of "expressive" vs. "instrumental" preferences." International Journal of Aging and Human Development, 1973, 4, 147-156.

Hiemstra, R.P. The Older Adult and Learning. Lincc , Ne.: University of Nebraska, 1975.

Hooper, J.O., & March, G.B. "A study of older students attending university classes." Educational Gerontology, 1978, 3, 321-330.

Houle, O. The Inquiring Mind: A Study of the Adult Who Continues to Learn. Madison, Wis.: The University of Wisconsin Press, 1961.

Johnstone, J.W.C., & Rivera, R.J. Volunteers for Learning. Chicago: Aldine Press, 1965.

Kasworm, C. "The Illiterate Elderly." Paper presented at National Adult Education Association Meeting, Anaheim, California, 1981.

March, G.B., Hooper, J.O., & Baum, J. "Life span education and the older adult: Living is learning." Educational Gerontology, 1977, 2, 163-172.

Marcus, E.E. "Effects of age, sex and status on perception of the utility of educational participation." Educational Gerontology, 1978, 3, 295-319.

McAuley, W.J., Arling, G.A., Nutty, C. and Bowling, C. Statewide Survey of Older Virginians. Final report: Volume II Research Series No. 3. Richmond, Virginia, November, 1980.

National Advisory Council on Adult Education. A Target Population on Adult Education. Washington, D.C.: U.S. Government Printing Office, 1974.

National Center for Education Statistics, "Changes in Scope and Methodology in the Survey of Adult Education; 1969-1978" Paper available from NCES, 1980.

National Center for Education Statistics. Participation in Adult Education: Final Report, 1969. Washington, D.C.: U.S. Government Printing Office, 1974.

National Center for Education Statistics. Participation in Adult Education: Final Report, 1972. Washington, D.C.: U.S. Government Printing Office, 1976.

National Center for Education Statistics. Participation in Adult Education: Final Report, 1975. Washington, D.C.: U.S. Government Printing Office, 1978.

National Center for Education Statistics. Participation in Adult Education, 1978. Unpublished data.

National Center for Education Statistics. Participation in Adult Education, 1981. Unpublished data.

New York State Education Department. Adult Participation in Postsecondary Education. Albany, New York, 1980.

New York State Education Department. New York State Continuing Education Needs Assessment Report No. 1: Statewide Analysis. Albany, New York: University of the State of New York, Division of Continuing Education, 1977.

Northcutt, N. Adult Functional Competency: A Summary. Austin: Industrial and Business Training Bureau, The University of Texas, March 1975.

Peterson, D.A. "Toward a definition of educational gerontology." In R.H. Sherron & D.B. Lumsden (eds.). Introduction to Educational Gerontology, Washington: Hemisphere, 1978.

Peterson, D.A. "Participation in education by older people." Educational Gerontology, 1981, 7, 245-256.

Sprouse, B.M. "Participation motivations of older adult learners." Paper presented at Lifelong Learning Research Conference; College Park, Maryland, 1981.

Thorson, J.A. "Future trends in education for older adults." In R.H. Sherron and D.B. Lumsden (eds.), Introduction to Educational Gerontology. Washington, Hemisphere, 1978.

United States Department of State. "Education." In the U.S. National Report on Aging for the United Nations World Assembly on Aging. Washington, D.C.: U.S. Government Printing Office, June 1982.

U.S. Department of Commerce, Bureau of the Census. Current Population Reports. Series P-20, Nos. 45, 99, 158, 207 and 356; Series P-25, No. 476.

Wasserman, F.M. "The educational interests of the elderly: A case study." Educational Gerontology, 1976, 1, 323-330.

Appendix B: Survey Designs and Methods

Because of differences in methodologies, definitions and type of data collected, many of the survey results presented in this paper were not directly comparable. A brief description of the major national survey discussed throughout this paper should provide some insight into these differences.

Volunteers for Learning, National Opinion Research Center of the University of Chicago. Johnstone & Rivera, 1965.

This survey was based on a probability sample of 11,957 households and netted information on the learning activities of 23,950 adults. Adults were defined as "All householders 21 years of age or over; or under 21 but married; or under 21 but head of a household; plus all persons 21 or over who live on an armed forces base and have close family ties with some adult member of an American household; and anyone 21 or over and living in a school residence or dormitory and closely related to some household member." The estimated size of this population in June 1962 was 114 million. Johnstone and Rivera found that 26,120,000 adults participated in some form of adult education between June 1961 and June 1962. Adult education was broadly defined to include any systematic learning activity, including self-education. It is noteworthy that of the 26 million participants (1 adult in 5), some 8,960,000 (about 36 percent) were engaged in self-education. Of the population 55 and over, only 9% were involved in learning activities.

Participation in Adult Education, National Center for Education Statistics (NCES); 1969, 1972, 1975, 1978 and 1981.

The National Center for Education Statistics has produced comprehensive reports on participation in adult education for 1969, 1972 and 1975. Data has also been collected for 1978 and 1981, but is still in unpublished form. One of the primary virtues of these reports is their standardization of definitions and measures, thus permitting reliable comparisons of participation data on a longitudinal basis. However, substantial changes were made in the 1975, 1978 and 1981 surveys to include participants in adult education who were also full-time students in programs leading toward a high school diploma or college degree and to exclude courses taken by adults who were full-time students in vocational or occupational programs of six months or more duration. Because of the changes in scope and methodology, it is misleading to plot trends in adult education using data from the five survey results. Therefore, participation rates of older persons are presented from all five surveys, but further discussion of the data is limited to 1975, 1978 and 1981 results. The data base for the NCES reports is determined partly by the sampling procedures of the Current Population Survey of the Bureau of the Census, which collects the data for the NCES. Unlike the Johnstone and Rivera and ETS studies, self-education is not included in the NCES definition of adult education. Total participation is reported by NCES was 13,041,000 in 1969; 15,734,000 in 1972; 17,059,000 in 1975; 18,197,000 in 1978 and 21,252,000 in 1981.

Of all of the participants in adult education, the elderly were only 2.1% of the total participants in 1969; 2.4% in 1972; 2.8% in 1975; 3.0% in 1978 and 3.6% in 1981.

A more complete analysis of the 1975 NCES data on the participation of older adults in educational activities was done by Heisel, Darkenwald and Anderson in 1981. Results of this analysis are presented throughout this paper.

Myth and Reality of Aging in America, NCOA/Louis Harris and Associates, 1974.

For the purpose of understanding and documenting both the image and the reality of old age and older Americans, the National Council on the Aging, Inc., commissioned Louis Harris and Associates to conduct an in-depth survey. Trained Harris interviewers conducted a total of 4,254 in-person household interviews during 1974. The sample included a representative cross-section of the American public 18 years of age and over, selected by random probability sampling techniques. Additional representative samples were selected to provide adequate numbers for detailed analysis of the conditions and attitudes of each group. These groups included the public 65 and over, blacks 65 and over, people 55 to 64 (those approaching retirement age). A total of 2,797 persons 65 and over were interviewed, representing 15% of the total adult population of this country (approximately 21 million people).

Analysis of this data showed that only 2% of all persons 65 and over were enrolled in some educational institution or taking courses.

Aging in the Eighties. NCOA/Louis Harris and Associates, 1981.

This survey was conducted as a sequel to the 1974 study, Myth and Reality of Aging. It is based on interviews with 3,452 Americans 18 and over; of these, 1,495 are from a national cross-section of adults, using multistage random cluster sampling. The remainder of the interviews came from separate oversamples of persons 65 and over, persons aged 55 to 64 and blacks and Hispanics. The total number of persons 65 and older was 1,837. All the sample interviews were combined and weights were applied using the 1980 census figures to adjust the entire sample for the known distribution of age, race and sex groups. All interviews for this study were conducted in person by trained Harris interviewers. Results of this survey indicated that 5% of persons 65 and over were taking courses or enrolled in an educational institution.